Telkom Indonesia
the world in your hand

Digital Innovation
to Fight Covid-19

Siti Choiriana
Direktur Consumer Service
PT Telekomunikasi Indonesia

IndiHome
SemuaRumahSemuaBisa
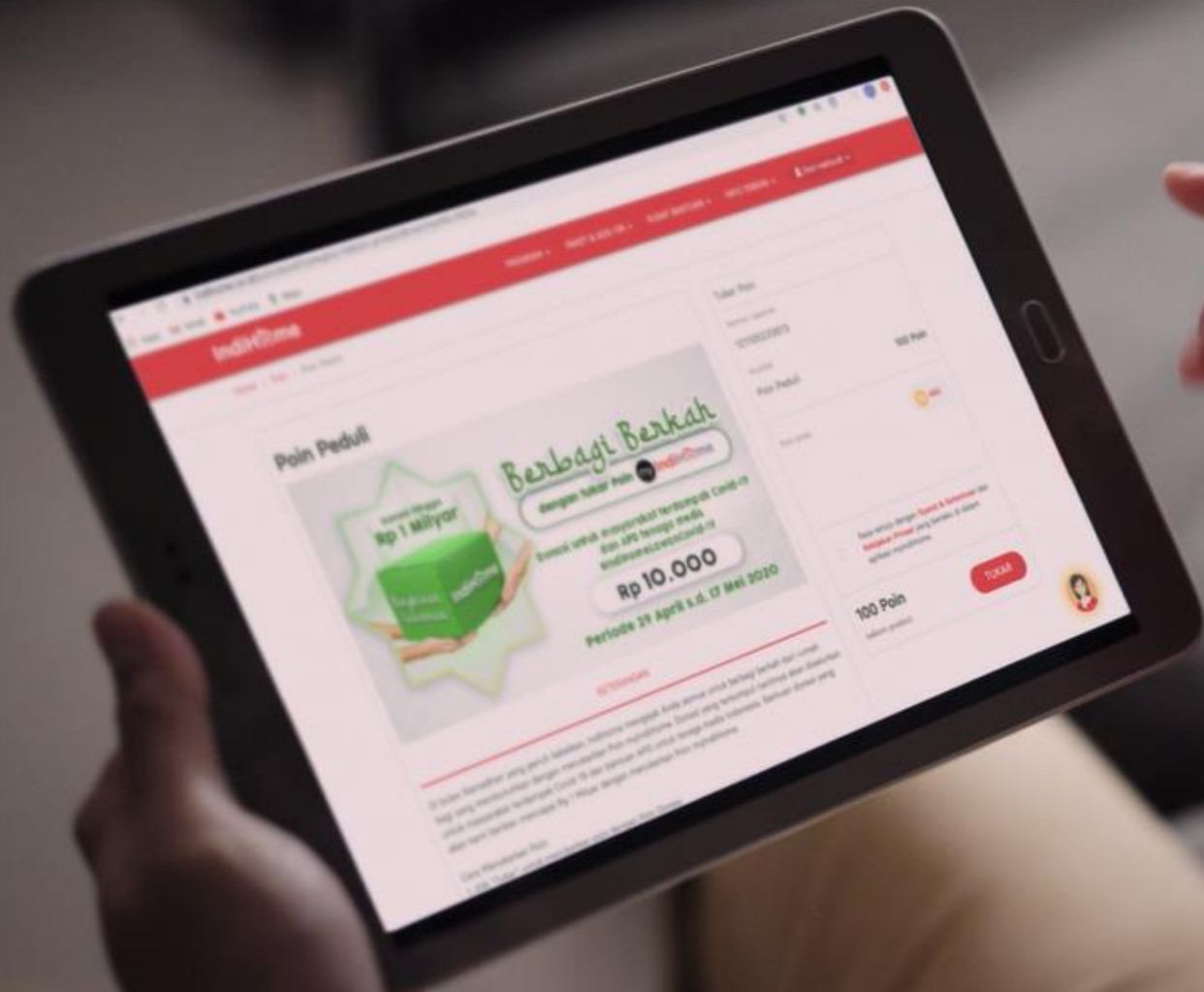
OUTLINE

1. Impact Covid on any Industries

2. Company Anticipation

3. Digital Innovation in Covid Situation

"In The Next Two Years, people are scared with their money, and many conventional jobs will not be the same. So, **Invest our time in education, get IT skill, and use Digital Transformation** to improve our business"

Impact Covid on any Industries

The COVID-19 Heat Map

Potential Winners & Losers in the Short Term

Manufacturing (Non-Essentials)

Financial Services

Construction & Real Estate

Education

Medical Supply & Services

Automotives

Potential Losers

Oil & Gas

Potential Winners

Food Processing & Retail

Aviation & Maritime

Agriculture

Personal & Healthcare

Tourism & Leisure

E-Commerce

ICT

There are 8 important implications
from consumer and market behavior

Managing For Now

1. **Protect customers and employees**
2. **Identify and strengthen vulnerabilities** in value chain to ensure business continuity
3. **People are price inelastic** for essential goods hence be laser focused on promos and trade spend and create a war chest for a down cycle post crisis
4. **Move to digital** is sharp and will persist even after the crisis
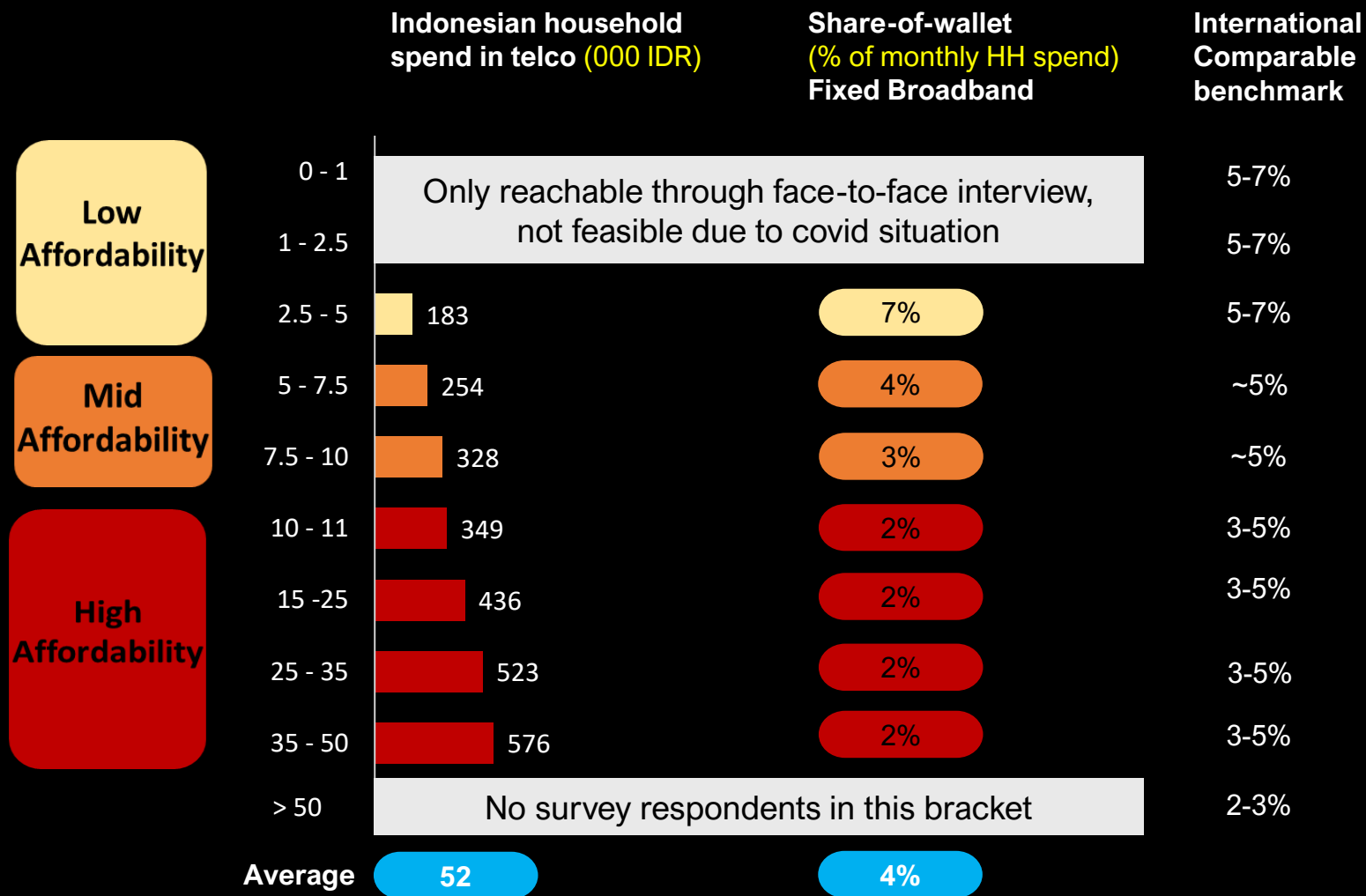5. **Strong modern trade** critical as customer rationalize stores visited

Managing For Later

1. **Go after talent pools -** digital talent pools have been released in hardest hit industries
2. **Double down on M&A –** opportunity for;
   - Vertical integration: distributors, deployment/maintenance vendors
   - Horizontal expansion: lending license, gaming
3. **Create product / enter business** to aid customer now and be in line with what will become **"the new normal"** e.g payment to enable cashless behavior

Family Share-of-Wallet in **Broadband**

"The average family spends **4%** share-of-wallet in Broadband"

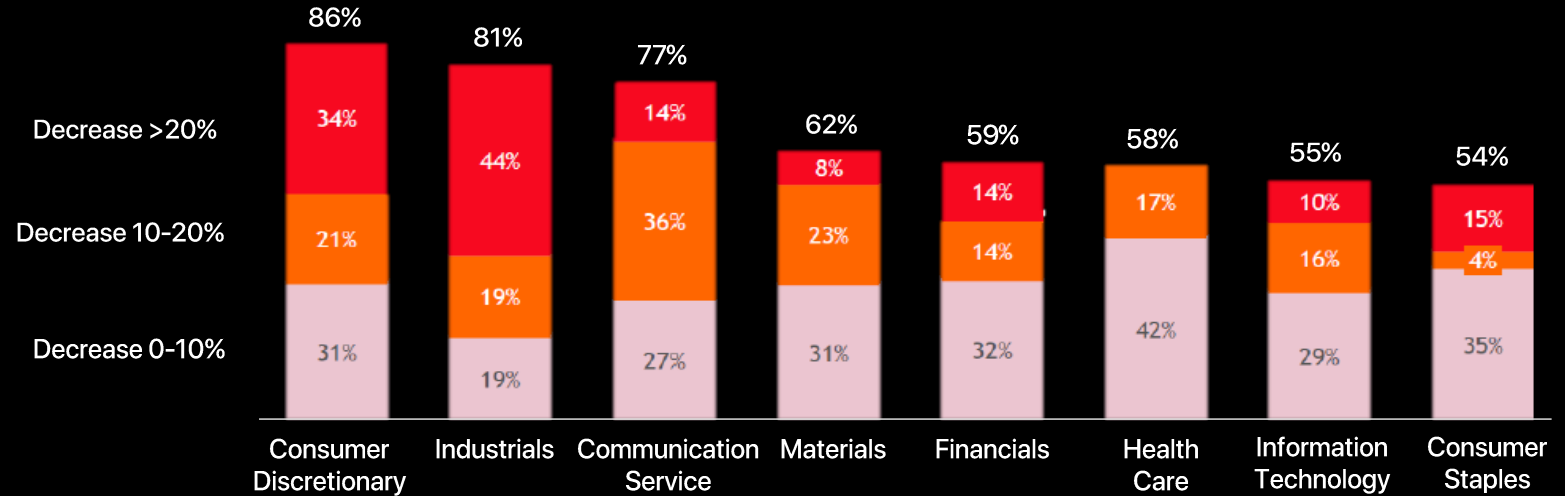| Affordability	Range	Indonesian household spend in telco (000 IDR)	Share-of-wallet (% of monthly HH spend) Fixed Broadband	International Comparable benchmark
Low Affordability	0 - 1	Only reachable through face-to-face interview, not feasible due to covid situation		5-7%
	1 - 2.5			5-7%
	2.5 - 5	183	7%	5-7%
Mid Affordability	5 - 7.5	254	4%	~5%
	7.5 - 10	328	3%	~5%
High Affordability	10 - 11	349	2%	3-5%
	15 - 25	436	2%	3-5%
	25 - 35	523	2%	3-5%
	35 - 50	576	2%	3-5%
	> 50	No survey respondents in this bracket		2-3%
Average		52	4%	

Key Insights :

- HH roughly allocate **50%** of telco spending to home broadband

- Broadband spend range from **~7% for low affordability**, down to **~2% for high affordability** HH

- Most volume comes from **mid-affordability HH** bucket

- **International comparable benchmarks are inline**, conservative on lower incomes

Impact on the Telco Sector

% of companies expecting negative revenue impact in FY20 due to COVID-19

Decrease >20%
Decrease 10-20%
Decrease 0-10%

Consumer Discretionary — 86%
- 34%
- 21%
- 31%

Industrials — 81%
- 44%
- 19%
- 19%

Communication Service — 77%
- 14%
- 36%
- 27%

Materials — 62%
- 8%
- 23%
- 31%

Financials — 59%
- 14%
- 14%
- 32%

Health Care — 58%
- 17%
- 42%

Information Technology — 55%
- 10%
- 16%
- 29%

Consumer Staples — 54%
- 15%
- 4%
- 35%

COVID-19 Impact on the Telco Sector

DEMAND
Delay in demand countered by greater and perceived value of certain product:
- − Less / Delayed transactions
- − Liquidity and payment challenges for some B2B customer
- + New product opportunities

SUPPLY & INSTALL
Some supply chain risk, depending on evolution of pandemic with short term spikes in demand for specific product:
- − Device sales / delivery dampened
- − Roll-out & installation activities delayed
- + Certain purchases delayed and reducing load on supply

OPERATIONS
Standard operations likely to remain stable, fault-related risks likely to increase:
- − Greater pressure on fault resolution and NW stability
- + No Predictable risk to foundations of operations

Source: Boston Consulting Group

Customer Insight : IndiHome Case

Work from Home and Learning from Home

- Needs of Internet Service
- Needs of Entertainment
- Service Level Guarantee

- Customer Purchasing Power

Vendors & Partner Issues

- Cost of Content
- Cost of Network and Infrastructure
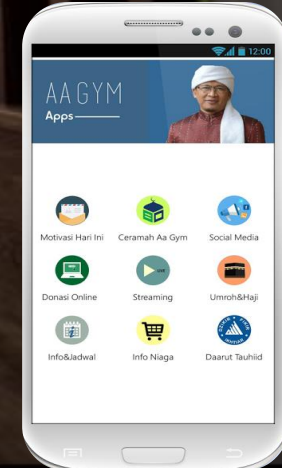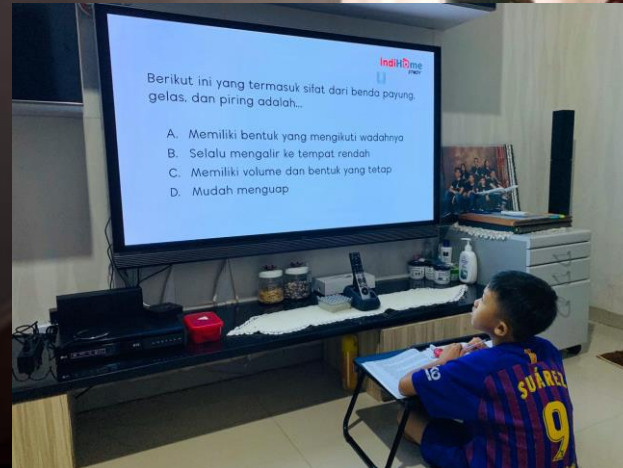- Cost of Customer-Premise Equipment
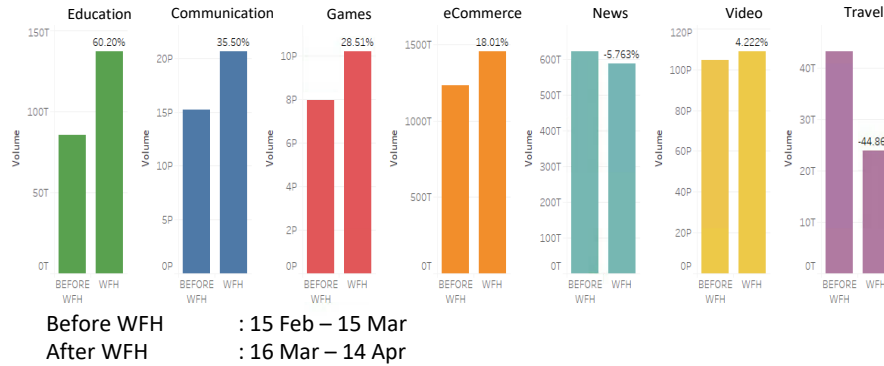
Trend Work From Home

Trend Learning From Home

Trend Teaching From Home

Trend Ceramah Online
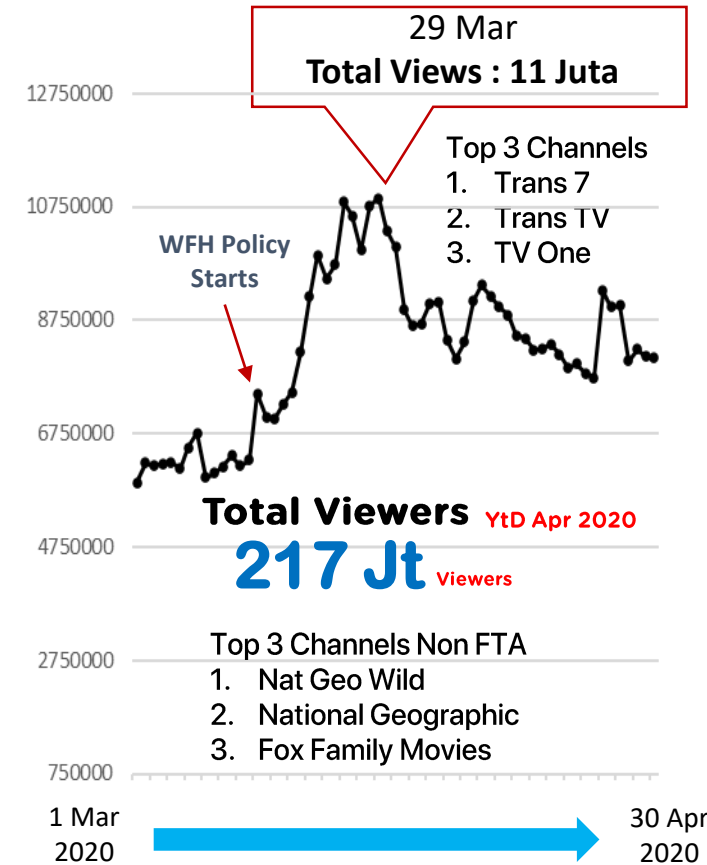
Customer Insight: IndiHome Case

IndiHome Customers Internet Usage

Chart	Value
Education	60.20%
Communication	35.50%
Games	28.51%
eCommerce	18.01%
News	-5.763%
Video	4.222%
Travel	-44.86%

Before WFH : 15 Feb – 15 Mar
After WFH : 16 Mar – 14 Apr

Note:
IndiHome customers Internet usage has increased in several categories such as education, communication, games, e-commerce, and video while news and travel categories have decreased

Others 2%
zoom 16%
18%
64%
skype

Average Subscriber 16 Apr- 1 May

| Rank	Apps	Average Subscriber	Share
1	Skype	970,565	64.1%
2	MicrosoftTeams	273,028	18.0%
3	Zoom	240,966	15.9%
4	WebEx	22,630	1.50%
5	Whereby	2,887	0.19%
6	GoToMeeting	2,032	0.13%
7	UMeetMe	727	0.05%
8	CloudX	207	0.01%
9	FreeConference	12	0.00%
Total : 1,5 Mio user /day			

IndiHome customers access Video Conference of 1.5 Million per day, **Skype** is the most frequently accessed.

Internet Traffic Before and After WFH

Traffic Peak Trend Before and After WFH Policy
— Peak Siang — Peak Malam

WFH Starts

Day Peak growth 28,5 %
Night Peak growth 21,5%

9 Mar 2020 → 30 Apr 2020
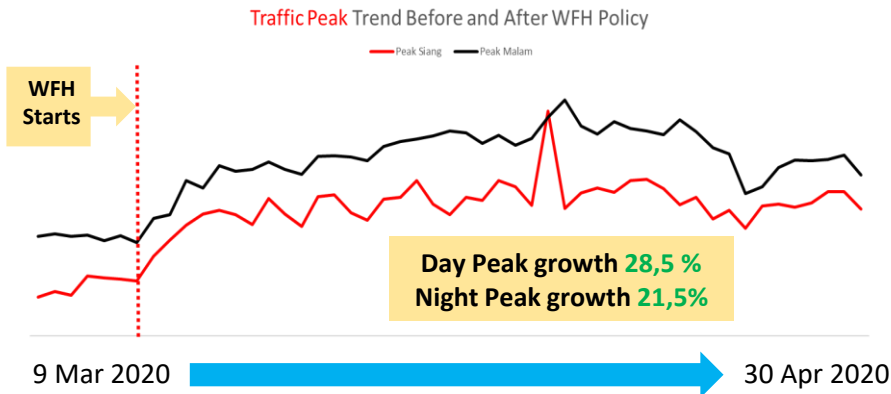
Note:
After WFH there was a significant increase in traffic
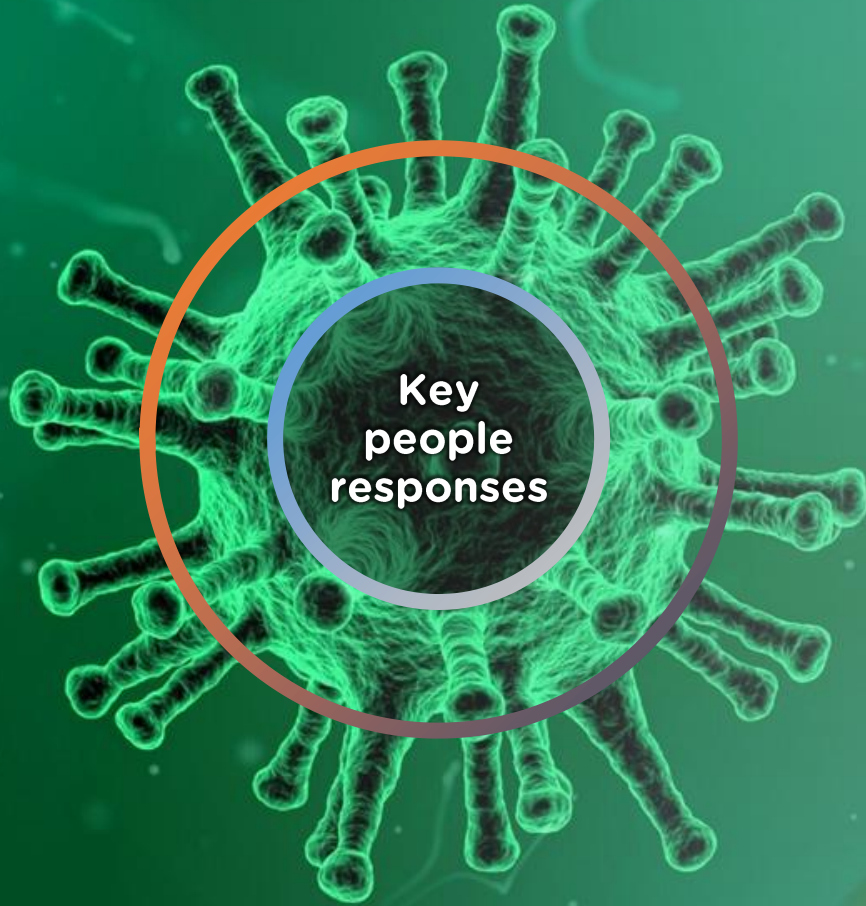
Internet Usage for E-Commerce

1. Shopee
2. Alibaba
3. e-CommerceSite
4. Lazada
5. Tokopedia
6. Taobao
7. OLX
8. Bukalapak
9. AliExpress
10. Amazon
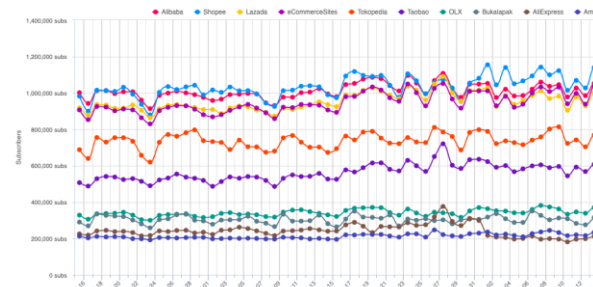
~ 6.3 Mn Subscriber

Note:
IndiHome customers who access e-commerce have increased by 18% after WFH

UseeTV Viewers

29 Mar
Total Views : 11 Juta

Top 3 Channels
1. Trans 7
2. Trans TV
3. TV One

WFH Policy Starts

Total Viewers YtD Apr 2020
217 Jt Viewers

Top 3 Channels Non FTA
1. Nat Geo Wild
2. National Geographic
3. Fox Family Movies

1 Mar 2020 → 30 Apr 2020

Note:
- UseeTV viewers have increased after WFH
- During WFH period there was an open all channel for customer

COVID-19 responses for seven key people topics

People Health
1. Accelerate smart work
2. Enhance corporate health & hygiene

Workforce readiness
3. Mitigate People Risk
4. Manage workforce flexibility

Communication & Support Culture
5. Communicate openly with empathy
6. Stand Together
7. Speed Up Digital Readiness

Key people responses

Success Factors of Contact-Tracing Application in Several Countries

1 **Strong top-down mandate and public trust in govt**
- Govt seen as initiative lead, not private companies
- Public accept greater good of public health

2 **Single app for the entire nation**
- No fragmented, multiple-app situation

3 **Focus on key functionality time is of the essence**
- Launch app with basic contact tracing function ASAP
- Other function (e.g crowd control) can be launched in later apps update

4 **Mandated app download and adoption**
- Critical user threshold needed for app to work effectively

5 **Strong data privacy protection laws**

1.1 million users 25% Population

Singapore
Launch 20 Maret 20
First case COVID -19: 23 Jan 20

21 million users 46% Population

Korea Selatan
Launch 11 Feb 20
First case Covid-19: 20 Jan 20

5.5 million users 55% Population

Israel
Launch 23 Maret 20
First case Covid-19: 21 Feb 20

All Population 100% Population

Taiwan
Launch 01 Feb 20
First case Covid-19: 21 Jan 20

75 Million users 6% Population

India
Launch 01 April 20
First case Covid-19: 30 Jan 20

Update 26 Aoril 2020

Source: Bain & Co

Company
Anticipation & Response

Telkom Change Culture During the Pandemic

Special Task Force for IndiHome provisioning and troubleshooting during Pandemic

Educate Covid-19 for Customers in MOBI (Mobil IndiHome)

Telkom Services During The Pandemic

Complaint handling was conducted by video call

Virtual Plasa Telkom to keep providing excellent customer service
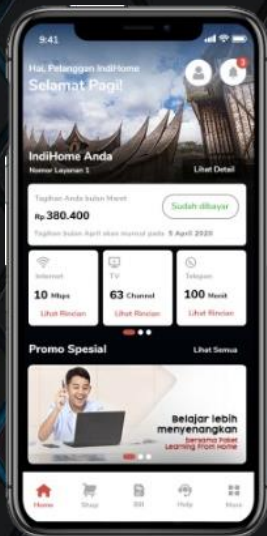
Only One Click Away:
1. IndiHome Provisioning
2. Upgrade Services and Add On
3. IndiHome Payment
4. Report IndiHome Trouble
5. Complete information about IndiHome

Telkom Content Creation During The Pandemic

Program Bisnis Dari Rumah

Ruang Trampil

MENTOR & INVESTOR

Program Talkshow yang mengangkat tutorial dan solusi untuk para investor Indonesia.

1.

RUANG BERKEBUN

Tutorial mengenai bercocok tanam yang mudah dilakukan dan diaplikasikan untuk memulai usaha/dalam kehidupan sehari-hari.

2.

3.

RUANG KREATIF

Tutorial tentang hal-hal ekonomi kreatif yang mudah dilakukan dan diaplikasikan untuk memulai usaha.

4.

RUANG BUDIDAYA HEWAN

Tutorial mengenai budidaya hewan yang mudah dilakukan dan diaplikasikan untuk memulai usaha/dalam kehidupan sehari-hari.

Digital Innovation Trend during the Pandemic

Virtual Music Concert

Telemedicine

SME goes online

Work & Learn from Home

Telkom also provided the similar innovations

iKonser
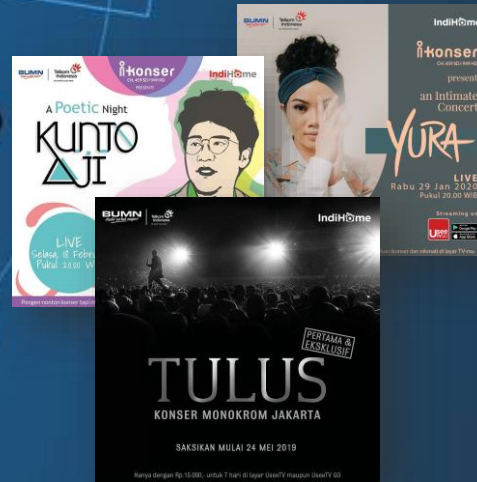
iKonser is a live and recorded concert, broadcasted through the USeeTV and UseeTV Go

Online Consultation
from Telkomedika & Yakes-Telkom
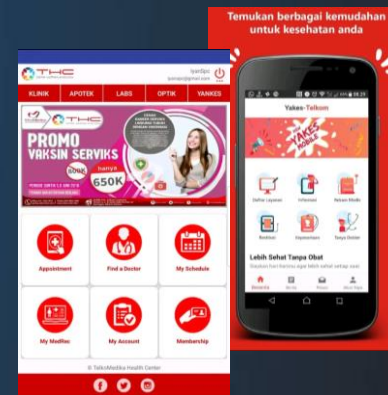
Online consultation with dedicated doctor and the medicine will be sent to our address

Innovations for SME

Innovations for WFH & LFH

Contact-Tracing Technology for Covid-19: PeduliLindungi

PeduliLindungi is a mobile application for public that will **notify users** by text or call if they ever had **encountered suspect** and/or **patient of Covid-19**.
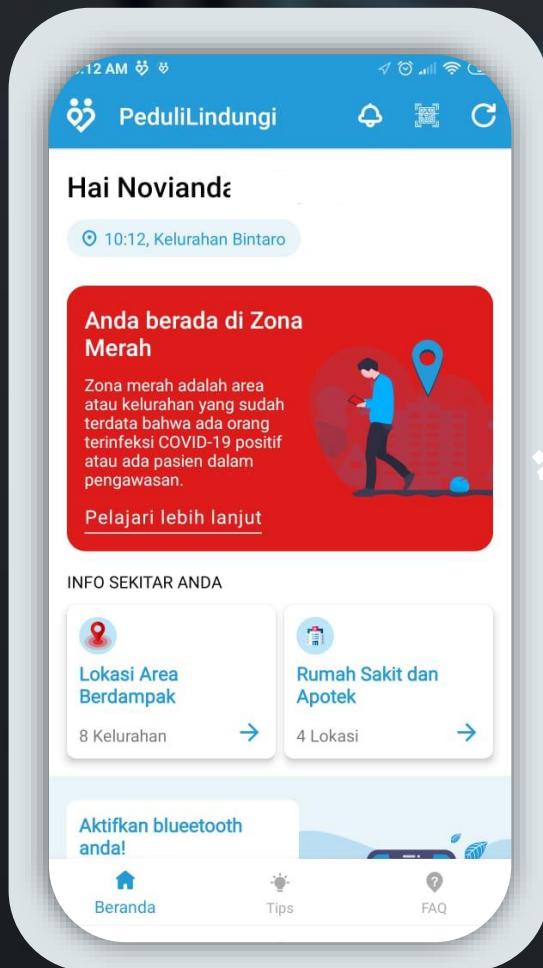
3 Fitur Utama PeduliLindungi

TRACING

Menelusuri orang yang diduga terinfeksi karena pernah kontak dengan suspect COVID-19

TRACKING

- Memberikan **status ODP** secara otomatis kepada pendatang
- Memudahkan **proses tindaklanjut** kepada orang yang berpotensi terinfeksi

FENCING

- Memberikan **status** dan **mengawasi** proses karantina mandiri (ODP dan PDP)
- Memberi **peringatan** apabila terjadi pelanggaran protokol karantina
- Memberikan **informasi daerah yang rawan** dengan memberi **alert** bila berada di keramaian/kerumunan

IndiHome STUDY

Support Pelajar
Learning From Home

Platform

Android/iOS   Website
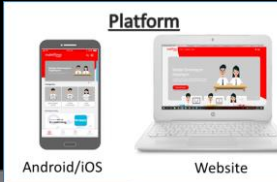
IndiHome Study merupakan aplikasi edukasi dalam platform mobile dan web, berisikan buku-buku digital pelajaran **SD-SMA**, soal tryout dan video pembahasan soal yang dapat diakses dari mana saja menggunakan internet

1.428 Ebook
Buku Pelajaran Kurikulum 2006 & 2013

1.897 Video Pembahasan
Soal-soal ujian Penilaian Tengah Semester, Penilaian Akhir Semester, UNBK (SD-SMA) & SMBPTN (SMA)

24.047 Soal Tryout
Penilaian Tengah Semester, Penilaian Akhir Semester, UNBK (SD-SMA) & SMBPTN (SMA) dengan metode berbasis komputer

SD
Kelas 4, 5, dan 6
Bahasa Indonesia, Bahasa Inggris, Matematika, IPA dan IPS

SMP
Kelas 7, 8, dan 9
Bahasa Indonesia, Bahasa Inggris, Matematika, IPA dan IPS

SMA
Kelas 10, 11, dan 12
Bahasa Indonesia, Bahasa Inggris, Matematika **(IPA & IPS)** Fisika, Biologi, Kimia **(IPA)**, Ekonomi, Geografi, Sosiologi **(IPS)**
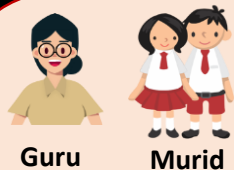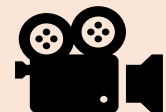
Guru   Murid
760 Ebook
170 Video
2.300 Soal Tryout
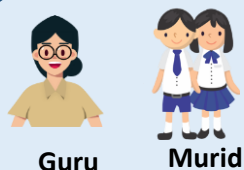
Guru   Murid
477 Ebook
336 Video
4.750 Soal Tryout

Guru   Murid
1.428 Ebook
1.390 Video
16.997 Soal Tryout

Video Conference to Support Productivity : **UMeetMe**

Umeetme is an online application that makes it easy to communicate through **video conferencing**, **voice / video calls and chat** for Public
https://conf.umeetme.id/

Create **manageable** meeting Room
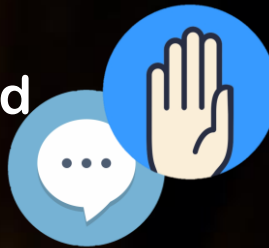
Share screen to participants

Video Sharing

Raise hand and **chat** features

Manage **video quality**

Setting **Room** password

Let's Start Video Conference with UMeetMe !

Digital Signature to Support Legality Document : **PrivyID**

PrivyID is **Indonesia's 1st legally-binding electronic signature provider**. With PrivyID, we are able to sign documents anytime, anywhere with valid and verified identity. The feature can detect any changes to signature or document's content and request for multiple signatures in one go.

PrivyID has been used by more than **3.9 Million users** and **182 companies** in Indonesia

Clients

- BANK BRI
- sekuritas sinarmas
- Telkom Indonesia
- mandiri
- CIMB BANK
- RHB — PT. RHB Sekuritas Indonesia
- ADIRA FINANCE
- BCAfinance — solusi tepat pembiayaan anda
- al akulaku
- Gramedia
- KlikACC — Aman Cermat Cepat
- AwanTunai
- KOINWORKS

Certifications

- TÜVRheinland CERTIFIED
- OJK OTORITAS JASA KEUANGAN
- BANK INDONESIA BANK SENTRAL REPUBLIK INDONESIA

Digital Innovation to Support SME: Sakoo

Sakoo is an **integrated offline and online sales channel management solution** to help business owners increase the effectiveness and efficiency of operational activities to customer management through one dashboard. WWW.SAKOO.ID

sakoo by Telkom Indonesia

1,128 Seller

23,438 Products

72,141 Order Synced

Benefits of Sakoo

sakoo by Telkom Indonesia

Centralized Management

Marketing Channels in various marketplaces

Provide **business analysis**

IT and Operation **Helpdesk** for client

Free Online Store

Marketplace Integrator

Digital Innovation to Support SME: bonum & QRen

bonum

https://bonum.id/

Bonum POS is a point of sales application that was developed with the aim of helping Small Medium Business in managing their business.

QRen
Cara Bayar Kekinian

https://qren.tmoney.co.id/

Qren is a Non-Cash based payment media utilizing the Quick Response (QR) Technology that has been standardized by Bank Indonesia. It connects merchants with e-money based issuer application such as LinkAja, Ovo, GoPay, Dana etc.

Features

Menu of Products

Input Order & Calculate Manually

Financial Report

Merchants
Payment Point Online Bank

IndiHome · KERETA API PT. KERETA API INDONESIA (PERSERO) · Garena connecting world gamers

Garuda Indonesia · Batik air · TIRTA DHARMA · OTO Kredit Mobil by PT. OTO MULTIARTHA

MEGAXUS PAYMENT · citibank · etc
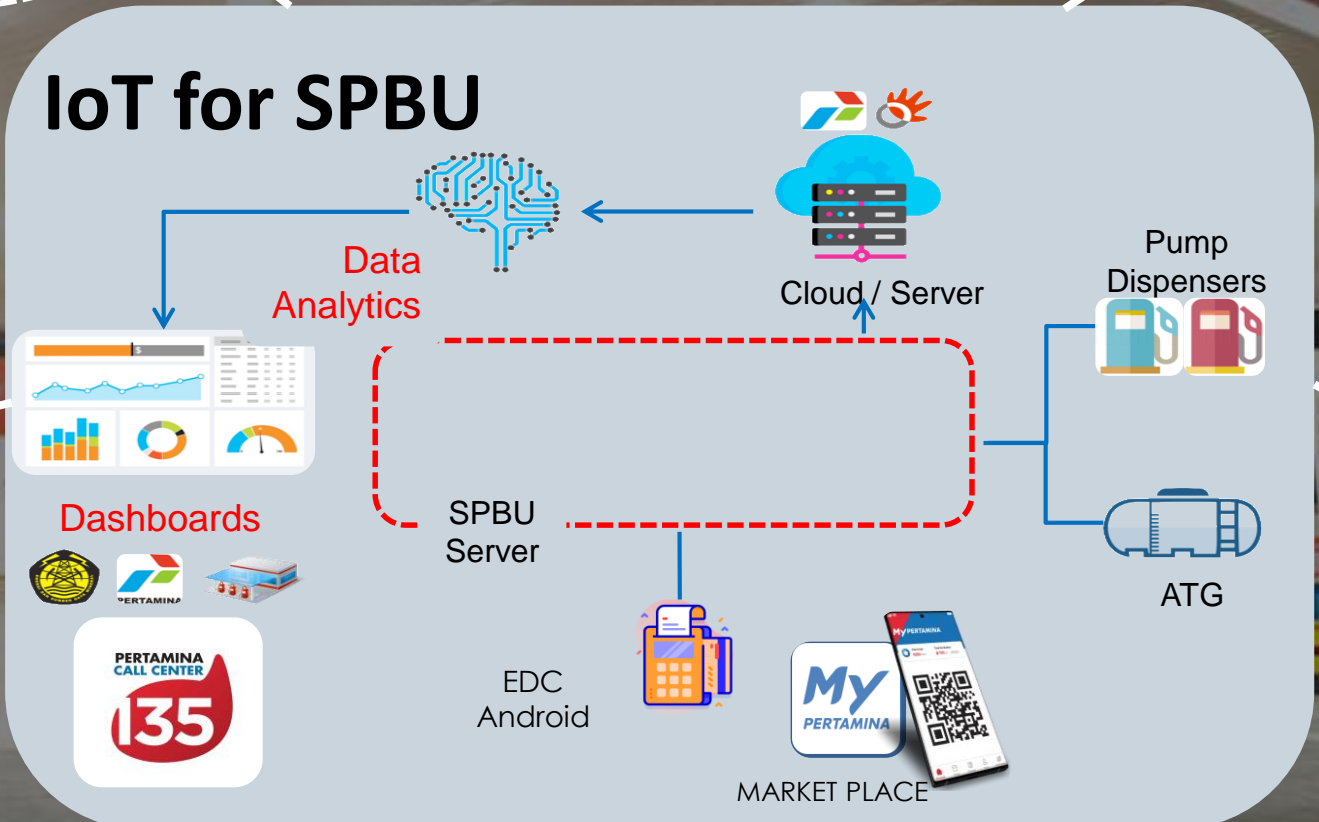
Digital Innovation: Rumah Sakit

Integrated System
- SIMRS
- Electronic Medical Record
- Laboratory Information System
- Prescription Online
- RIS / PACS

Hospital Environment
- Power Management
- Air Quality Management
- Surveillance Management
- Asset Management

Network Environment
- Layanan jaringan yang aman untuk ekosistem Rumah Sakit
- Layanan jaringan yang terintegrasi dengan perangkat CPE
- Menjamin data pemantauan sistem
- Real time performance reporting

Identification System
- Memanfaatkan teknologi RFID, beacon, dan QR Code
- Teknologi yang digunakan untuk Tracking pasien
- Layanan yang memungkinkan perpindahan data secara paperless

Client Device
- Monitor PC
- Server
- eKiosk

SMART HOSPITAL

Dashboard to Control All Activities : Sales and Resource

Monitoring Hitam Hijau
(Plan Target Area Penjualan)
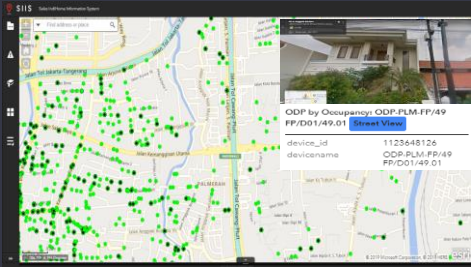
Monitoring ODP merah
(Plan Deployment PT2/PT3)
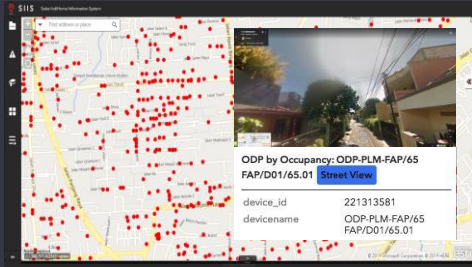
Monitoring Mobilitas Teknisi
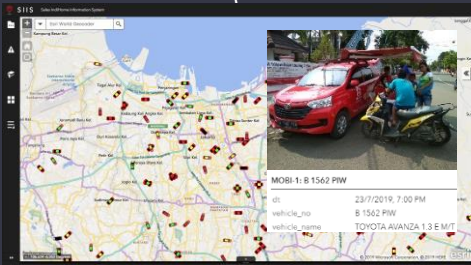(Tracking Pergerakan & ProduktivitasTeknisi)
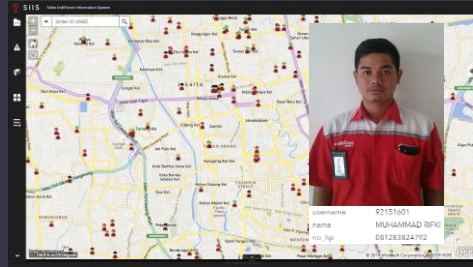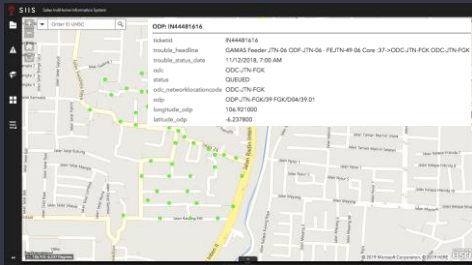
Monitoring Cabut Layanan
(Area Cabut layanan Tertinggi)
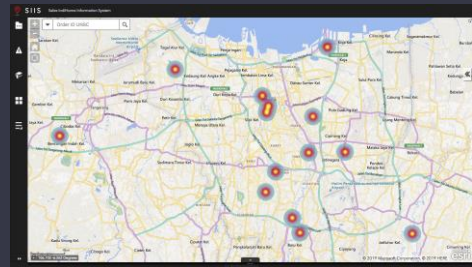
Monitoring Deployment Project
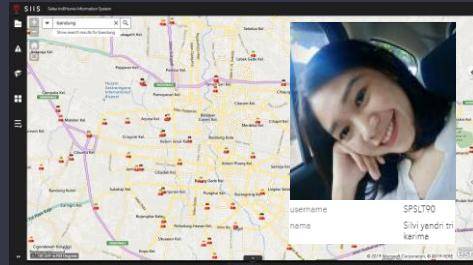(Plan Target Penjualan indent)
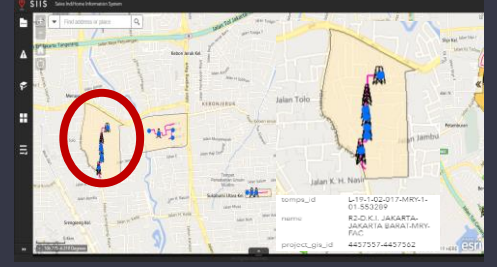
Monitoring Mobilitas MOBI
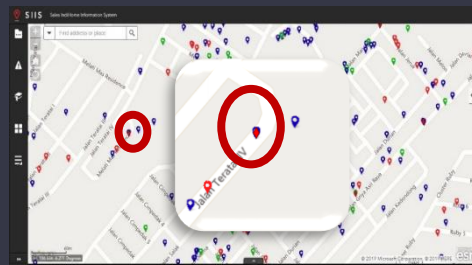(Tracking Pergerakan & Produktivitas Mobi)
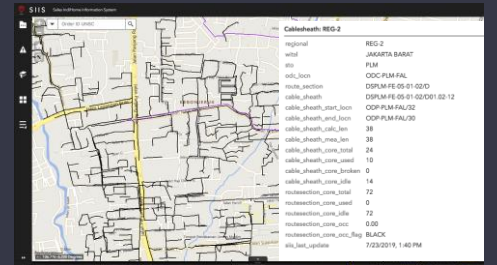
Monitoring Gamas
(Area terdampak Gamas)

Monitoring Mobilitas Sales Force
(Tracking Pergerakan & Produktivitas Sales Force)

**Monitoring Cabut Pasang**
(Monitoring black list pelanggan)

Monitoring Core Management
(Plan Deploy PT2)

The Special Achievement in GIS (SAG) Award ceremony is held at the annual Esri User Conference. Jack Dangermond, president and founder of Esri, personally selects recipients and presides over the ceremony. Jack Dangermond solicited nominations of outstanding users from vertical industry managers, U.S. regional offices, and international distributors. Nominations were carefully evaluated. Your organization was one of 175 chosen from more than 100,000 Esri clients worldwide.
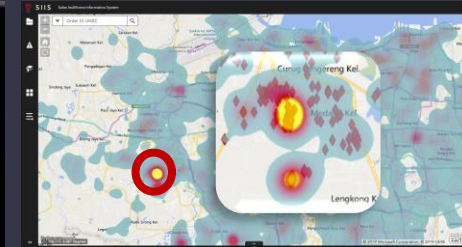
Monitoring CT0
(Area CT0 tertinggi)
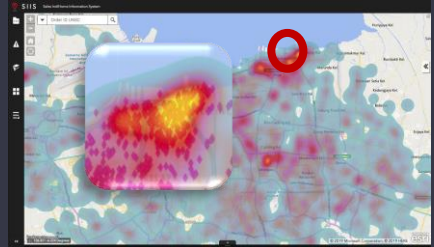
Monitoring Penjualan tertinggi
(Area sales tertinggi 1 minggu terakhir)

Family

Productivity

IndiHome
SemuaRumahSemuaBisa

TERIMA KASIH

Education

Entertainment

Health